



USAID
FROM THE AMERICAN PEOPLE

EXPANDED AGRIBUSINESS AND TRADE PROMOTION (USAID E-ATP)

In fulfillment of the following deliverable under task 3.2.1:

Value chain action plans in place, with implementation updates
built into annual workplans
Poultry (FY 2012)

Contract/ Project No.: EDH-1-00-00005-11

Submitted to: Danielle Knueppel, COR
Expanded Agribusiness and Trade Promotion
USAID/WA
Accra, Ghana



Abt Associates Inc. ■ 4550 Montgomery Lane, Suite 800 North ■
Bethesda, Maryland 20814 ■ Tel: 301.347.5000. ■ Fax: 301.913.652.9061
■ www.abtassociates.com

In collaboration with:

ACDI/VOCA J.E Austin
CARANA Corporation ASVELIS
Banyan Global Global Cold Chain Alliance

POULTRY VALUE CHAIN DEVELOPMENT PLAN UPDATED FOR FY 2012



November 2011

This publication was produced for review by the United States Agency for International Development. It was prepared by Abt Associates Inc. in collaboration with ACDI/VOCA for the Expanded Agribusiness and Trade Promotion project.

Recommended Citation: Expanded Agribusiness and Trade Promotion Project. November 2011. "Poultry Value Chain Development Plan Updated for FY 2012." Prepared for the Expanded Agribusiness and Trade Promotion Project by Abt Associates Inc. in collaboration with ACDI/VOCA, Bethesda, MD.

Contract/Project No.: EDH-1-00-00005-11

Submitted to: Danielle Knueppel, COR
Expanded Agribusiness and Trade Promotion Project
USAID/WA
Accra, Ghana



Abt Associates Inc. ■ 4550 Montgomery Avenue ■ Suite 800 North ■
Bethesda, Maryland 20814 ■ T. 301.347.5000 ■ F. 301.913.9061 ■
www.abtassociates.com

En collaboration avec:

ACDI/VOCA	ASVELIS	CARANA Corporation
Banyan Global	J.E. Austin	Global Cold Chain Alliance

POULTRY VALUE CHAIN DEVELOPMENT PLAN UPDATED FOR FY 2012

DISCLAIMER

The author's views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development (USAID) or the United States Government.

CONTENTS

CONTENTS.....	v
LIST OF ACRONYMS.....	vi
EXECUTIVE SUMMARY	viii
1. INTRODUCTION	1
1.1 Overview of the USAID E-ATP project.....	1
1.2 Project strategy	2
1.3 Expected outcomes.....	2
2. POULTRY VALUE CHAIN IN WEST AFRICA.....	3
2.1 Major analysis and workshop findings.....	3
2.1.1 Constraints and opportunities	4
2.2 Vision	6
3. USAID E-ATP STRATEGY, OBJECTIVES, AND ACTIVITIES TO DEVELOP THE POULTRY VALUE CHAIN.....	7
3.1 USAID E-ATP strategy	7
3.2 Component 1: Enhance access to inputs	8
3.2.1 Objective	8
3.3 Component 2: Strengthen regional and national poultry inter-professional organizations and producer associations	9
3.3.1 Objective	9
3.4 Component 3: Improve commercial poultry slaughter and cold chain facilities.....	10
3.4.1 Objective	10
3.5 Component 4: Improve poultry market and trade information.....	11
3.5.1 Objective	11
3.6 Component 5: Mitigate avian influenza.....	11
3.6.1 Objective	11
4. CROSS-CUTTING ACTIVITIES.....	13
4.1 Finance.....	13
4.2 Policy.....	13
4.3 Organizational strengthening	13
4.4 Transport.....	13
4.5 Gender	13
4.5.1 Activities.....	14
5. POULTRY VALUE CHAIN DEVELOPMENT PLAN Error! Bookmark not defined.	
5.1 FY12 Poultry Value Chain Activity Plan (October 2011– December 2012 and June 2012 for ASVELIS).....	15

LIST OF ACRONYMS

ACDI	Agence Canadienne de Développement International
ADF	African Development Fund (of the U.S. Government)
AI	Avian influenza
ASVELIS	Asian Veterinary & Livestock Services
ATP	Agribusiness and Trade Promotion project
AU-NEPAD	African Union's New Partnership for Africa's Development
CAADP	Comprehensive Africa Agriculture Development Program
DOC	Day-old chicks
E-ATP	Expanded Agribusiness and Trade Promotion Project
ECOWAP	Regional Agricultural Policy for West Africa
ECOWAS	Economic Community of West African States
ETH	Eggs-to-hatch
FAO	Food and Agriculture Organization
FAO/ECTAD	FAO's Emergency Centre for Transboundary Animal Diseases
FCFA	Common Currency of Communauté Financière de l'Afrique
FY	Fiscal Year (of USG); runs from 1 October to 30 September
GCCA	Global Cold Chain Alliance
GHFSI	Global Hunger and Food Security Initiative
HPAI	Highly Pathogenic Avian Influenza
INTSORMIL	International Sorghum and Millet Collaborative Research Support Program
M&E	Monitoring and evaluation
MFI	Microfinance Institutions
MIS	Market Information System
NAIP	National Agricultural Investment Program
NSC	National sanitary committees
OIE	World Organization for Animal Health
PAFASP	Programme d'Appui aux Filières Agro-Sylvo-Pastorales (Burkina Faso)
PAN	Poultry Association of Nigeria
STOP AI	Stamping Out Pandemic and Avian Influenza
UEMOA	Union Économique et Monétaire Ouest Africaine (WAEMU in English)

UOFA	Union des Organisations de la Filière Avicole des Pays de l'UEMOA
USAID	United States Agency for International Development
VAT	Value-added tax
VCDP	Value Chain Development Plan
WAEMU	West African Economic and Monetary Union (UEMOA in French)

EXECUTIVE SUMMARY

USAID's Expanded Agribusiness and Trade Promotion project (E-ATP) expands on the requirements of the ongoing Agribusiness and Trade Promotion project (ATP), launched in 2008. Both projects contribute to achieving the 6 percent agricultural growth target set under the Comprehensive Africa Agriculture Development Program (CAADP) of the African Union's New Partnership for Africa's Development (AU-NEPAD). USAID E-ATP's primary objective is to increase the value and volume of intra-regional agricultural trade in staple food products in West Africa in support of the Global Hunger and Food Security Initiative (GHFSI) and the Regional Agricultural Policy for West Africa (ECOWAP) Investment Plan.

The project's implementation is based on agricultural investment programs at the national as well as the regional levels. Reflecting the priorities of the ECOWAP/CAADP mobilizing programs, E-ATP is designed to improve the efficiency of intra-regional trade by addressing a set of critical constraints, including:

1. A poor enabling environment, especially policy implementation.
2. The absence of well-developed links across regional value chains.
3. Limited market information and support services, such as finance.
4. Physical and policy barriers and poor private-sector practices in supply chain management contributing to very high transport costs.

E-ATP focuses on activities in key value chains (millet/sorghum, rice, and poultry) and along key transport/trade corridors in which it seeks a catalytic impact in supporting West Africans to develop durable solutions to these constraints. In addition, E-ATP has an avian influenza (AI) component focused on approaching AI from the producer organization standpoint.

The present value chain development plan (VCDP) presents E-ATP's activities in the poultry value chain. It is based on the project's assessment of the poultry value chain, which it conducted in four West African countries (Côte d'Ivoire, Ghana, Burkina Faso and Mali). It is also based on a complementary, avian influenza assessment, which began in mid-November 2009 and covered those same four countries plus Senegal and Nigeria.

The following are highlights of these assessments' key findings on the constraints faced by the region's poultry value chain operators:

Inadequate Supply of Day-Old Chicks (DOC) and Eggs-to-Hatch (ETH): There is significant domestic capacity to produce ETH and DOC in the key coastal producing countries of Côte d'Ivoire, Ghana and Senegal, but more limited capacity in interior countries (Burkina Faso, Mali). There are opportunities for coastal countries to export DOC and ETH to interior countries, as well as to coastal countries with less commercially developed poultry value chains, such as Guinea, Liberia, Togo, and Benin.

Irregular Access to and High Cost of Feed: Feed is the key cost component in commercial poultry production, along with the investment in broiler or layer chicks. Maize is the principal

feed ingredient, although there are some efforts underway to expand tannin-free sorghum production in Mali (with INTSORMIL support), which could substitute in part for maize in poultry feed.

Limited Access to Quality Veterinary Products and High Mortality: Poultry mortality and morbidity are high in West Africa, and there is a long list of diseases that afflict poultry flocks. Access to high quality veterinary products (vaccines, drugs) is uneven, and biosecurity on smaller commercial farms is often inadequate. Access to veterinary services is also limited, in part due to the privatization of veterinary services that were previously performed by West African governments. E-ATP focuses primarily on prevention and control of AI among commercial poultry producers.

Limited Access to Finance for Poultry Value Chain Actors: Many commercial poultry farms in West Africa are entirely self-financed and commercial bank credit is rare. E-ATP has an agribusiness finance advisor who explores alternative sources of funding for selected poultry enterprises.

Limited Commercial and Hygienic Processing of Poultry: Nearly all poultry commercialized in West Africa is sold as live birds in open-air markets. E-ATP believes that there is scope to expand commercial slaughter in hygienic facilities in cities so that urban consumers can buy whole chickens or chicken parts and offals.

Barriers to Intra-regional Trade in Poultry Products: The main barrier to trade in poultry products is the ban on exports from West African countries that experienced AI outbreaks. Both these countries and non-AI infected countries have also banned imports. This has led to a significant decline in exports of local breeds of poultry (village chicken and guinea fowl) from Burkina Faso and Mali to coastal countries, although the trade continues in an informal and clandestine way. Trade in DOC and ETH has also been affected, as exports from Ghana and Côte d'Ivoire to Burkina Faso and Mali are not permitted.

Based on the above, the E-ATP project's strategy for the poultry value chain has five main components. The fifth component focuses on mitigating future AI outbreaks.

1. **Improve access to inputs:** Commercial poultry producers will have improved access to critical inputs such as DOC, ETH, feed, feed supplements, equipment and materials.
2. **Strengthen regional and national poultry inter-professional organizations and producer associations:** Regional and national inter-professional poultry organizations and producer associations will be better able to serve member needs and advocate for policy and regulatory reform and public investment in the value chain.
3. **Improve commercial poultry slaughter and cold chain facilities:** Establish slaughter and cold-chain facilities that serve as models to the region.
4. **Improve poultry market and trade information:** Support the domestic and intra-regional trade promotion objectives of E-ATP. Better information on potential trading partners, input and product prices, and current trade flows, will facilitate the development of contacts and trade deals.

5. **Mitigate avian influenza:** Public and private sector actors employ better practices to mitigate the threat of avian influenza and control the spread of potential outbreaks.

E-ATP's strategy is implemented in close collaboration with several bilateral and regional programs whose initiatives in the poultry value chain are supported by USAID and other donor and national structures. Objectives and planned activities are presented for each component in turn. The last section of the VCDP presents the final FY2012 development plan.

I. INTRODUCTION

This document outlines the value chain development plan (VCDP) for the poultry value chain of USAID's Expanded Agribusiness and Trade Promotion project (E-ATP). This section presents an overview of the E-ATP project in general and in the poultry value chain specifically. It provides an overview of the West African poultry value chain and outlines opportunities and challenges related to improving its competitiveness and enhancing its role in addressing regional food security. Lastly, this VCDP presents the key objectives and project activities for the remainder of the project with the poultry value chain ending in December 2011, along with a detailed activity plan for FY 2012 (October-December 2011 only).

I.1 OVERVIEW OF THE USAID E-ATP PROJECT

The Expanded Agribusiness and Trade Promotion project (E-ATP) builds on the requirements of the ongoing Agribusiness and Trade Promotion project (ATP), launched in 2008. Both projects contribute to achieving the 6 percent agricultural growth target set under the Comprehensive Africa Agriculture Development Program (CAADP) of the African Union's New Partnership for Africa's Development (AU-NEPAD). E-ATP's primary objective is to increase the value and volume of intra-regional agricultural trade in staple food products in West Africa in support of the Global Hunger and Food Security Initiative (GHFSI) and the Regional Agricultural Policy for West Africa (ECOWAP) Investment Plan.

The implementation of ECOWAP/CAADP is based on national agricultural investment programs (NAIPs), as well as on regional-level "mobilizing" programs. The latter aim for: (1) the promotion of strategic products for food sovereignty; (2) the promotion of a global environment conducive to regional agricultural development; and (3) the reduction of food vulnerability and the promotion of sustainable access to food. These "mobilizing" programs reflect the ECOWAS Commission's strategic priorities for the transformation of the West African agricultural sector, and are designed to accelerate the implementation of the regional agricultural policy.

E-ATP is designed to advance the above objectives by improving the efficiency of intra-regional trade. It purports to do this by addressing a set of critical constraints, including:

1. A poor enabling environment, especially in implementing (and enforcing) policy and regulatory reform
2. The absence of well-developed links across regional value chains
3. Limited market information and support services, such as finance
4. Physical and policy barriers and poor private-sector practices in supply chain management contributing to very high transport costs

E-ATP also has an avian influenza (AI) component focused on approaching AI from the producer organization standpoint. This component aims to improve producer knowledge

and implementation of good biosecurity practices, and facilitate partnerships with the public sector to respond to and contain outbreaks.

I.2 PROJECT STRATEGY

USAID E-ATP focuses on activities in key value chains (poultry, rice, and millet/sorghum) and along key transport/trade corridors where it can have a catalytic impact in supporting West Africans to develop durable solutions to these constraints. Helping them do so will drive substantial increases in intra-regional trade during the project and make them sustainable after the project ends. The project addresses a range of cross-cutting issues, including gender, the environment, and public-private alliances.

I.3 EXPECTED OUTCOMES

The USAID E-ATP consortium implements integrated activities and programming to contribute to the following Outcomes:

- **Outcome 1:** Significant reduction of the incidence of physical and policy-related barriers to moving agricultural and related commodities regionally in West Africa, with a special focus on facilitating the trade in staple foods from surplus to deficit areas.
- **Outcome 2:** Enhanced linkages among agricultural producers and agro-input suppliers, agro-processors, and distributors.
- **Outcome 3:** More effective advocacy by regional private sector and other non-governmental actors for regional and national policies in support of a conducive environment for increased regional agricultural trade.
- **Outcome 4:** Improved efficiency of trade transactions and regional market access, in particular through the improvement of regional market information systems and facilitation of market linkages.
- **Outcome 5:** Enhanced capacity of private poultry and animal health sectors to reduce the risk of AI outbreaks and transmission, and the capacity to recover after highly pathogenic avian influenza (HPAI) outbreaks.

2. POULTRY VALUE CHAIN IN WEST AFRICA

In September-October 2009, E-ATP conducted a poultry value chain assessment in four West African countries (Côte d'Ivoire, Ghana, Burkina Faso and Mali). This was complemented by a six-country avian influenza assessment, begun in mid-November 2009, which included those same four countries plus Senegal and Nigeria.

These studies provided the requisite material and contacts for organizing a regional consultative workshop of value chain stakeholders, which the project held in late January, 2010 in Accra, Ghana. Over 40 participants representing leading private sector actors, professional organizations, and government officials attended the two-day workshop. The objective was to review study findings, discuss constraints and opportunities in particular areas, and work towards agreement on necessary changes in the value chain, actions needed to realize these changes, and means by which the project or other organizations could support stakeholders in this process. The workshop focused on the following:

- Promoting intra-regional trade of eggs-to-hatch (ETH) and day-old chicks (DOC) to respond to shortages, particularly in Sahelian countries.
- Identifying opportunities to expand marketing and trade of poultry meat and eggs (as opposed to trade in live birds).
- Developing strategies to promote egg consumption through improved marketing and distribution.
- Defining the roles of and challenges before national and regional inter-professional organizations and producer associations.

The remainder of this section summarizes the results of these efforts and outlines the overall project strategy aimed at addressing issues that fit with the regional mandate and specific objectives of the USAID E-ATP project. The detailed objectives and activities that this strategy comprises are presented in the following section.

2.1 MAJOR ANALYSIS AND WORKSHOP FINDINGS

A key assumption underlying this value chain assessment is that the best way to achieve increases in poultry productivity, marketed surpluses, and intra-regional trade, is to focus on change within the modern poultry subsystem, rather than in traditional poultry operations involving local breeds and the long-distance marketing of live birds (with all of the attendant biosecurity risks). This assumption stems from the view that the participants in the modern poultry subsystem are the most progressive and amenable to change and improvements consistent with international and regional animal health and biosecurity standards.

The study focus was determined ex ante and not based on extensive analysis, discussion or vetting with E-ATP project staff (who had not yet been hired when the study was launched),

though it was consistent with the quick-start analysis in the E-ATP technical proposal. The consultant's decision was made against a backdrop of relatively recent avian influenza (AI) outbreaks in most West African countries, which led to government interdictions on cross-border trade in live poultry. According to OIE protocols (World Organization for Animal Health protocols), changing the status of a country from AI-endemic to AI-free requires a series of transparent and well-documented steps, which typically take well over a year to achieve. With this major caveat in mind, let us continue the summary and recommendations.

2.1.1 CONSTRAINTS AND OPPORTUNITIES

Inadequate Supply of Day-Old Chicks (DOC) and Eggs-to-Hatch (ETH)

There is significant domestic capacity to produce ETH and DOC in the key coastal producing countries of Côte d'Ivoire, Ghana and Senegal, but more limited capacity in interior countries (Burkina Faso, Mali). The interior countries import many of their DOC from the EU at high cost; efforts to promote DOC production in Burkina Faso have had mixed results while progress is being made in Mali, which still imports most of its ETH from Brazil via Senegal.

There are opportunities for coastal countries to export DOC and ETH to interior countries, as well as to coastal countries with less commercially developed poultry value chains such as Guinea, Liberia, Togo, and Benin. The West Africa region should be able to greatly reduce imports of DOC from the EU. Imports of ETH from low-cost producers such as Brazil will likely continue in the short run, but as breeding flocks expand in coastal countries these imports should decline. Importation of exotic breeding stock will undoubtedly continue for some time.

Irregular Access to and High Cost of Feed

Feed is the key cost component in commercial poultry production, along with the investment in broiler or layer chicks. Maize is the principal feed ingredient, although there are some efforts underway to expand tannin-free sorghum production in Mali (with INTSORMIL support), which could partially substitute maize in poultry feed. Coarse grain prices fluctuate inter-seasonally and inter-annually. As many poultry producers lack access to finance and sufficient storage capacity, they are unable to take advantage of lower post-harvest prices for grain.

Other feed ingredients, particularly protein sources such as cottonseed cake, soybean meal, and fish meal, are often expensive and limited in supply or of low quality. Cottonseed cake has declined in the past six to seven years as cotton cultivation has decreased; cotton area has been replaced largely by grain cultivation, particularly maize. Soybeans are not yet grown in sufficient volume in West Africa, though it is a promising crop. Fish meal is either expensive, when imported from the international market, or of variable and often low quality when it comes from coastal West African countries.

Limited Access to Quality Veterinary Products and High Mortality

Poultry mortality and morbidity are high in West Africa, and there is a long list of diseases that afflict producers. Newcastle disease and gumboro cause the highest mortality, though AI has been the focus of recent animal health interventions as it is a zoonotic disease that can cross over to humans. Access to high quality veterinary products (vaccines, drugs) is

reportedly uneven, and biosecurity on smaller commercial farms is often inadequate. Access to veterinary services is also limited, in part a function of privatization of veterinary services that were previously performed by West African governments. Public veterinary services did receive donor support to prevent the spread of AI, but over the past 20 years reduced support and privatization of veterinary services in many African countries has led to a reduction in the numbers of government veterinarians and veterinary service budgets.

While it is beyond the scope of the E-ATP project to address the issues of the structure and functioning of veterinary services in West African countries, E-ATP is committed to improving biosecurity on commercial poultry farms and along the poultry value chain. E-ATP will focus primarily on the prevention and control of AI among commercial poultry producers.

Limited Access to Finance for Poultry Value Chain Actors

Many commercial poultry farms in West Africa are entirely self-financed and commercial bank credit is rare. A few farms or firms have tapped into outside sources of funds such as microfinance institutions (MFI) and grants from donors (such as the African Development Fund, ADF), but most poultry investments have been funded through income from other sources (such as extended family), and other businesses owned by the poultry farm investors (e.g. construction, transport).

Commercial banks perceive poultry production as risky, especially in a post-AI outbreak environment. E-ATP's agribusiness finance advisor explores alternative sources of funding for selected poultry enterprises. He also works with targeted financial institutions that are willing to lend to agribusiness firms in order to educate them about the opportunities and risks in the poultry value chain, how to analyze investments in poultry enterprises, and how to assess the creditworthiness of particular firms.

Limited Commercial and Hygienic Processing of Poultry

Nearly all poultry commercialized in West Africa is sold live, in open-air markets. As a live chicken or guinea fowl costs FCFA 1,500 to 3,000, this expenditure represents a significant outlay for many West African consumers, and this limits purchases and consumption to special occasions for most urban households. In contrast, red meat (beef, small ruminant meat) is typically bought in lots of FCFA 200 to FCFA 500. Poultry are not typically slaughtered, cut up, and sold in pieces at retail markets; imported frozen poultry is often sold this way, mainly in coastal West African cities, so it competes well against live birds and red meat.

E-ATP believes that, although consumers prefer fresh poultry meat (over frozen products), there is scope to expand commercial slaughter in hygienic facilities in cities so that urban consumers can buy whole chickens or chicken parts and offals. To this extent, there is a need to invest in upgrading slaughter facilities and cold chains to ensure sanitary poultry products. The cold chain in this context is relatively short given that commercial slaughter is performed close to end use markets, in peri-urban abattoirs specialized in poultry slaughter.

Barriers to Intra-regional Trade in Poultry Products

The main barrier to trade in poultry products is the ban on exports from West African countries that experienced AI outbreaks. Both these countries and non-AI infected countries have also banned imports. This has led to a significant decline in exports of local breeds of

poultry (village chicken and guinea fowl) from Burkina Faso and Mali to coastal countries, although the trade continues in an informal and clandestine way. Trade in DOC and ETH has also been affected, as exports from Ghana and Côte d'Ivoire to Burkina Faso and Mali are not permitted.

Regarding exports from AI-free countries, such as Senegal and Mali, the receiving countries (Mali and Burkina Faso for DOC and ETH) apply higher tariff rates than necessary (as if these inputs were sourced from outside the West African Economic and Monetary Union or WAEMU zone). Some operators also state that value added tax (VAT) is applied when it should not be.

2.2 VISION

As demand for higher quality and sanitary poultry products expands in urban areas in West Africa, E-ATP's vision for the regional poultry value chain is one in which private sector actors invest in improved poultry production practices, biosecurity, and slaughter/marketing facilities and practices. Intra-regional trade will initially be concentrated in poultry production inputs, particularly DOC and ETH, veterinary inputs, and feed. Intra-regional trade in poultry products, particularly chickens, chicken carcasses and meat, and eggs is likely to remain limited and informal for the most part. Some value chain participants will invest to upgrade poultry slaughter, butchering and meat packing, while others will invest to improve egg packaging and distribution. The project will concentrate resources on domestic, urban markets in five to seven countries.

Important elements of this vision include:

- An enabling environment with predictable and consistent policies that supports the private sector, incentivizes investment, and makes trading rules and regulations transparent.
- Continuous applied research and analysis to improve understanding of poultry production systems, input sources and uses (including feed), and ways in which some value chain actors are able to differentiate their products in line with their competitive advantage.
- A stronger regional poultry umbrella organization and stronger national associations able to advocate for trade policy reform, the clear and consistent application of ECOWAS/WAEMU rules and regulations on trade in poultry inputs and products, information sharing (technical and market information), and the facilitation of events or study tours that support trade and investment.

3. USAID E-ATP STRATEGY, OBJECTIVES, AND ACTIVITIES TO DEVELOP THE POULTRY VALUE CHAIN

3.1 USAID E-ATP STRATEGY

USAID E-ATP will focus on a manageable set of issues that will contribute to increasing intra-regional trade and biosecurity on farms and firms in the poultry value chain. The project will not focus on broader sub-sector development issues such as the need for investment in feed supply and feed processing facilities, or for the restructuring of public veterinary services. These issues are best addressed at the bilateral level. Instead, E-ATP will:

- Collaborate closely with ongoing bilateral programs (e.g., STOP AI, World Bank PAFASP, USAID bilateral projects in West Africa) and regional programs (FAO ECTAD, WAEMU, which is supporting the regional inter-professional federation UOFA, the *Union des Organisations de la Filière Avicole des Pays de l'UEMOA*) to avoid replicating their work.
- Raise trade policy and regulatory issues that constrain intra-regional trade with regional and national authorities.
- Strengthen regional and national inter-professional and producer associations to advocate for needed policy change and their implementation, as well as for public investment and services that will benefit the poultry value chain.
- Use selective grants, on a cost-sharing basis, to support inter-professional and trade associations and selected farms and firms. Grants to associations will help develop their capacity to respond to member needs, advocate for policy and regulatory reform, and diffuse both market information and information about poultry disease prevention and control, particularly AI. Grants to a few farms and firms will assist them to make biosecurity improvements and investments in equipment or process upgrades that improve productivity or enhance poultry products.
- Help national governments in the region improve the regulatory norms and standards and trader certification and control procedures that effectively limit commerce in poultry and poultry products in the region. E-ATP will work in close collaboration with the FAO to support and expand their initiatives in this area.

E-ATP's strategy to bring about this vision and contribute to the project's five outcomes has five main components. The fifth component focuses on measures to mitigate future outbreaks of AI. They are:

Component 1: Enhance access to inputs

Component 2: Strengthen regional and national poultry inter-professional organizations and producer associations

Component 3: Improve commercial poultry slaughter and cold chain facilities

Component 4: Improve poultry market and trade information

Component 5: Mitigate avian influenza

These components are analyzed below, along with details of specific activities to be undertaken.

3.2 COMPONENT 1: ENHANCE ACCESS TO INPUTS

3.2.1 OBJECTIVE

Commercial poultry producers have improved access to critical inputs such as DOC, ETH, feed, feed supplements, equipment and materials.

Activity 1: Support agreements to lift bilateral trade restrictions

In 2006, poultry trade was banned between Burkina Faso and Côte d'Ivoire following an AI outbreak. Four years later in 2010, once signs of AI were no longer present, the agricultural ministries of both countries simultaneously lifted the ban. E-ATP was a key player driving this change. Throughout 2010, it brought together private and public sector actors (including veterinarians) to discuss the project's value chain assessment findings for the poultry sector, and to identify options for lifting the trade bans, test for AI, implement biosafety best practices, and advocate for the development of bilateral agreements to eliminate trade bans. These efforts led to meetings in August 16-19, 2010 between the ministers in charge of animal resources in Burkina Faso and Côte d'Ivoire. They concluded that the health, sanitation, veterinary, biosafety, and commercial measures undertaken by the two governments and the poultry industry in both countries had reversed the spread of the disease. For this reason, they announced that the poultry ban was lifted, effective immediately, thus reversing the hardships inflicted on egg and chicken producers, as well as traders and consumers in both countries.

In 2011, the project helped mount advocacy efforts to revive trade in poultry products between Ghana and Burkina Faso. The project organized consultations between Ghanaian and Burkinabe veterinary service providers in Kumasi, Ghana. Veterinary service providers from the two countries pledged to continue to move towards completion of the World Animal Health Organization (OIE) AI-free self-declaration process. Each country has already sent sampling analysis reports to the OIE. The results of the analyses were all negative. Official letters still needed be sent to the OIE to declare these countries AI-free.

The objective of this activity is currently to support the poultry associations of Burkina Faso and Ghana in their efforts to lead veterinary service providers from both countries towards an AI-free self-declaration. For this, E-ATP will devote FY12 to:

- Working jointly with poultry associations in Ghana and Burkina Faso to facilitate their AI-free self-declarations.

- Organizing a meeting with relevant ministries in each country to support the process of sending an official letter to the OIE to complete the AI-free self-declaration process.

Expected results: Processes to conclude bilateral agreements underway, one or two agreements are concluded.

Activity 2: Application of regional trade policies

Within ECOWAS, raw materials and inputs ought to be exempt from excessive import duties. However, trade rules are unevenly applied and often create unforeseen costs for producers. For example, poultry producers in Burkina Faso routinely pay a 22 percent duty on poultry feed purchased in Mali, the nearest supplier. These rates should be closer to 5 percent.

To address these issues, E-ATP will support the *Union des Organisations de la Filière Avicole des Pays de l'UEMOA* (UOFA) and national inter-professional organizations undertake a strategic process of advocating for the application of regional trade policies. Anticipated activities include assisting organizations arrange and plan for meetings with relevant government authorities, developing advocacy materials, and building capacity to organize promotional events like poultry days to raise the sector's visibility.

Expected results: National governments adhere to agreed-upon regional trade policies covering imports of raw materials from within the region.

3.3 COMPONENT 2: STRENGTHEN REGIONAL AND NATIONAL POULTRY INTER-PROFESSIONAL ORGANIZATIONS AND PRODUCER ASSOCIATIONS

3.3.1 OBJECTIVE

Regional and national poultry inter-professional organizations and producer associations are better able to serve member needs and advocate for policy and regulatory reform and public investment in the value chain.

Activity 1: Support UOFA with technical assistance and grants to organize the *Journée Technique Avicole* (poultry technical day).

In 2011, E-ATP organized a workshop with the regional organization UOFA to ensure that its activities help to advance what is laid out in its action plan. During this workshop, participants asked E-ATP to conduct a study on transport and logistics for DOC along the corridor linking Kumasi and Accra (Ghana), Lome (Togo), and Cotonou (Benin). This study was conducted in July 2011.

UOFA will organize its fourth technical poultry day in Cotonou, Benin, involving representatives from eight WAEMU countries and Ghana. This is an opportunity for E-ATP to present the results of some of its activities:

- The aforementioned transport and logistics study concerning DOC.
- The establishment of a quality control process for the production of hatching eggs

and chicks in West Africa.

- The establishment of pilot poultry slaughterhouses in Senegal.
- The analysis of policies relevant to trade in poultry products among ECOWAS countries.

E-ATP will support UOFA through technical assistance, training courses, and grants.

Expected results: E-ATP's support of the regional poultry organization will improve its organization and management, and help it meet member needs, through technical assistance, training, and policy advocacy programs. This institutional strengthening will help lay the foundation for significant expansion in intra-regional trade in poultry production inputs and products.

3.4 COMPONENT 3: IMPROVE COMMERCIAL POULTRY SLAUGHTER AND COLD CHAIN FACILITIES

3.4.1 OBJECTIVE

Slaughter and cold-chain facilities are established as models for the region.

Activity 1: Improved poultry slaughtering facilities

During FY 2011, E-ATP evaluated poultry slaughterhouses in Burkina Faso, Mali and Senegal. This activity revealed that many actors working in poultry in the region were not undertaking slaughter operations in accordance with hygiene and sanitation standards. The project met with actors in the poultry sector to propose a pilot poultry slaughterhouse that would operate according to industry best practices. Six poultry value chain actors from Burkina Faso and Senegal were brought together to learn about the proposed pilot. The project provided details on the ideal structure for a poultry slaughtering facility, including different sections for different steps in the processing procedure, and outlined the types of equipment needed in slaughtering facilities.

After a series of meetings exploring the details, several of the Senegalese participants expressed interest in investing in the proposed poultry slaughtering facilities. Those who expressed interest will develop business plans in order to seek financing to rehabilitate their facilities. The project will help finance the acquisition of professional slaughtering equipment designed for small-scale facilities. After constructing the pilot facilities, the project will organize a training of those who will operate the facilities to ensure that workers follow best practices.

The objectives of the activity are: (i) to improve hygiene conditions during poultry slaughter by setting up appropriate infrastructure to serve as a pilot for poultry value chain actors, and (ii) to disseminate best practices in poultry slaughtering. In FY12, the project will:

- Monitor the development of business plans, providing support as needed.
- Support the search for financing of proposed investments.
- Follow the construction of buildings to be used for the slaughter facilities, to ensure

compliance with industry standards.

- Help investors acquire suitable equipment.
- Train 50 butchers inside the constructed, equipped pilot slaughter facilities in appropriate operations.

Expected results: The project will issue a report summarizing investment and operating costs, revenue streams and potential profitability under different assumptions for two to three different-scale slaughter facilities.

3.5 COMPONENT 4: IMPROVE POULTRY MARKET AND TRADE INFORMATION

3.5.1 OBJECTIVE

Better information about potential trading partners, input and product prices, and current trade flows facilitates the development of contacts and trade deals. By improving producer and trader access to market and trade information and opportunities, this component will support E-ATP's domestic and intra-regional trade promotion objectives.

Activity 1: Update *Who's Who Guide* for poultry value chain actors

To facilitate awareness of key actors in the region, potential trading partners, collaborators, and investors, the project will assist national inter-professional and producer associations in compiling and periodically updating the regional *Who's Who Guide*. The guide will be disseminated in print and digitally through regional partners and associations, Esoko Networks (which hosts a private sector market information system), and other regional structures.

Expected results: A who's who guide, downloadable from the project website

3.6 COMPONENT 5: MITIGATE AVIAN INFLUENZA

3.6.1 OBJECTIVE

Public and private sector actors employ better practices to mitigate the threat of avian influenza and control the spread of potential outbreaks.

Activity 1: Disseminate guides covering best practices in poultry slaughtering and meeting biosecurity standards

The project developed two good practice guides in 2011 covering production of ETH and DOC, and another regarding poultry slaughter. The two guides are aimed at improving sanitary practices in the production and processing of poultry. During FY12, E-ATP aims to make these guides easier to understand and disseminate the revised guides to poultry value chain actors in coordination with UOFA and the national associations of poultry producers, which will be responsible for distributing these to relevant poultry value chain actors.

Additional educational materials will also be produced, on sampling and laboratory testing protocols among others.

Activity 2: Capacity building for national sanitary committees

National sanitary committee (NSC) representatives from involved countries held their first sub-regional meeting in September 2011. They shared country-specific experience and plans, agreed on sub-regional activities, briefed the WAEMU, and received guidance from Asian Veterinary & Livestock Services (ASVELIS) experts. This was recognized as a cost-effective way to build capacities of NSCs, enabling them to lead regional initiatives. Two additional meetings (one in January or February 2012 and one in April 2012) will be co-funded by E-ATP and facilitated by ASVELIS experts.

Activity 3: Capacity building for auditors and laboratories

In July 2011, 14 auditors were trained at a regional meeting in Dakar on the methodological aspects of auditing poultry breeding flocks and hatcheries. Some of them then acquired on-the-job experience by conducting some initial field audits. E-ATP will fund field audits in November 2011 and project experts will revise the reports produced by each auditor and make recommendations for their improvement. A second round of field audits is expected to take place around March 2012. These will not be funded by E-ATP, but by NSCs. The project will support this activity from a distance by providing a technical review of the audit reports.

Some laboratory staff from each country will attend the annual RESOLAB meeting organized by FAO ECTAD in Bamako in December 2011. During the meeting, the project will collaborate with FAO ECTAD to review laboratories' ability to conduct analyses from samples collected in poultry breeding flocks and hatcheries, and provide recommendations regarding constraints and improvements.

Finally, auditors will collect samples during the field audits scheduled for November 2011 and March 2012, and send these to national laboratories. Laboratory reports will be reviewed by project staff to further advise on and improve protocols.

Activity 4: Support for a sub-regional poultry conference

The Poultry Association of Nigeria (PAN) will organize a sub-regional poultry conference focusing on issues related to poultry breeding flocks and hatcheries in April 2012 in Nigeria. This event will be co-funded by E-ATP. The project will help PAN with conference organization, and attend the conference. This event will be an occasion for the project to meet with stakeholders and take stock of progress.

4. CROSS-CUTTING ACTIVITIES

Cross-cutting programs of the E-ATP project will contribute to improvements in the poultry value chain as follows.

4.1 FINANCE

Poultry entrepreneurs and investors need financial resources to upgrade poultry production, marketing, slaughter and distribution. While many improvements can result from better management, organization and technical knowledge, others require investment in better equipment, facilities, and transport. E-ATP will work with interested entrepreneurs seeking to expand/improve current operations or invest in new ones to access agribusiness finance. Finance component will finish work in December 2011.

4.2 POLICY

E-ATP's policy team will support expanded trade in poultry inputs and products by clarifying tariff rates and identifying non-tariff barriers to trade. They will work with regional and national inter-professional organizations and producer associations to press governments and regional economic communities for consistent application of tariff rates and rules. Policy work is expected to finish end of April 2012.

E-ATP will also encourage national veterinary services in several West African trading partners to develop sanitary regulations and procedures governing trade in DOC and ETH as well as poultry meat.

4.3 ORGANIZATIONAL STRENGTHENING

One entire component of this VCDP concerns strengthening regional and national inter-professional organizations and producer associations to:

- Advocate for policy and regulatory reform and consistency in application.
- Identify and mobilize finance.
- Improve member access to market information and rules of intra-regional trade.
- Improve member knowledge of equipment and technology alternatives in production, processing, packaging, marketing and transport.

4.4 TRANSPORT

While long-distance transport mainly involves live village chicken in West Africa, transportation issues represent a constraint to intra-regional trade in DOC, ETH and poultry products (improved breeds of live birds, poultry meat, eggs). E-ATP will document the costs of moving poultry inputs and products—formally and informally—across borders and along trunk roads to major markets in the central corridor zone of West Africa. Other barriers to trade and non-monetary costs and delays will also be documented.

4.5 GENDER

The project's objective with respect to gender is to ensure that both women and men have access to the economic opportunities created by regional trade expansion, and that these opportunities be

realized in a way that strengthens equitable relations between and among women and men, particularly in decision-making processes, and in their access to project services and benefits.

4.5.1 ACTIVITIES

Proposed activities include:

- **Activity 1:** Promote gender equity in decision-making within poultry value chain organizations undergoing competency assessments.
- **Activity 2:** Facilitate access to finance and market information.
- **Activity 3:** Provide technical and financial assistance to build capacity in marketing and negotiation techniques, leadership and entrepreneurship.

Expected results: Increased capacity of women in decision-making and trade (leadership, entrepreneurship, membership). Increased access, by women, to financial resources and market information.

Activities	Cross-cutting Tech. Res.	Key partners	Oct	Nov	Dec
Component 1: Enhance access to inputs					
1.1 Lift bilateral trade restrictions					
Follow-up process of opening trade relations of poultry products between Burkina Faso and Ghana (support meeting of veterinary services, producers and suppliers of DOC/ETH)	Policy	UOFA + Nat'l Assocs			
Component 2: Strengthen inter-professional organizations & producer associations					
Support UOFA with technical assistance and grants to organize <i>Journée Technique Avicole</i>	GCCA, Org. Cap.	UOFA + Nat'l Assocs.			
Component 3: Improve information to promote intra-regional trade					
3.1 Who's Who Guide					
Prepare and disseminate the <i>Who's Who Guide</i> of key actors in the modern poultry value chain in the region					
3.2 Collect regional trade data					
Continue to support national trade associations for the collection of data on trade volumes and values	M&E, MIS	Nat'l Assocs			
Component 4: Improve commercial poultry slaughter and cold chain innovations					
4.1 Promote investments					
Support to business model and cost analysis for potential financiers of slaughter facility upgrades	Finance	Value chain actors			
Support to facilities building and equipping pilot slaughters	Finance	Value chain actors			

Activities	Cross-cutting Tech. Res.	Key partners	Oct	Nov	Dec
4.2 Promote model slaughter facilities					
Organize exchanges, visits and workshops around existing, model slaughter facilities		Value chain actors			
4.3 Disseminate good practice guide					
Print and disseminate good practice guidelines on poultry slaughtering	GCCA	Value chain actors			

Component 5: Mitigate avian influenza			Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
5.1 Quality assurance of DOC/ETH suppliers											
Print and disseminate good practice guidelines on biosecurity standards and ASVELIS 'kit'	ASVELIS										
Conduct field audits of farms and hatcheries in West Africa	ASVELIS										
Participate at RESOLAB workshop	ASVELIS										
Organize meeting of auditors	ASVELIS	Vet. Svcs Depts. UOFA, Nat'l Assocs.									